

Introduction

Background Information

Controlling hazardous energy sources and establishing systematic lockout-tagout procedures always has been part of the mission for the Occupational Safety and Health Administration. However, OSHA rules for lockout/tagout were scattered through the agency's general industry standards until 1990 when The Control of Hazardous Energy Sources (Lockout/Tagout) standard was adopted. The effective date for compliance with the standard in areas under federal OSHA jurisdiction was January 2, 1990.

The standard, 29 CFR 1910.147, was adopted by the N.C. Department of Labor as part of the requirements of the Occupational Safety and Health Act of North Carolina. The effective date for compliance in North Carolina was July 5, 1990. The standard is enforced by the Occupational Safety and Health Division, N.C. Department of Labor.

The Scope of This Guide

What the Guide Includes

On September 1, 1989, OSHA issued a final rule on the control of hazardous energy (lockout/tagout) in Title 29 of the Code of Federal Regulations (29 CFR) Part 1910.147. The standard for lockout/tagout (1910.147) went into effect on January 2, 1990. This standard helps safeguard employees from hazardous energy while they are performing service or maintenance on machines and equipment. The standard identifies the practices and procedures necessary to shut down and lock out or tag out machines and equipment, requires that employees receive training in their role in the lockout/tagout program, and mandates that periodic inspections be conducted to maintain or enhance the energy control program. This guide seeks to aid with understanding and applying the standard for control of hazardous energy (lockout/tagout). The requirements of 1910.147 are covered in four parts within this guide.

- Part 1 offers general information.
- Part 2 summarizes the standard.
- Part 3 provides an example/illustration of a plan, one possible plan that can be customized to train management and employees about the standard as it applies to the individual employer's establishment; note step 5 in part 4 seeks to dissuade the employer/employee from tagging out whenever locking out can also be accomplished.
- Part 4 provides a checklist for implementing the standard.

The lockout/tagout standard applies to general industry employment and covers the servicing and maintenance of machines and equipment in which the unexpected startup or the release of stored energy could cause injury to employees. (If employees are performing service or maintenance tasks that do not expose them to the unexpected release of hazardous energy, the standard does not apply.)

OSHA standards for construction also contain requirements for protecting workers from electrical hazards (29 CFR 1926.416 and 29 CFR 1926.417). These standards require that workers exposed to any part of an electrical power circuit be protected through de-energizing and grounding of the circuit or through appropriate guarding. These standards also require that all de-energized circuits be rendered inoperable and tagged out.

What the Guide Does Not Include

This guide does not attempt to address fully: group lockout/tagout procedures; periodic inspections, required by the standard; lockout/tagout procedures at shift changes; equipment testing or positioning; or lockout/tagout for complex operations. The References section, however, does offer information to assist the reader in these areas.